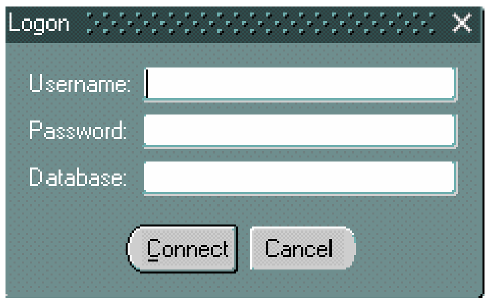
2. *EGRANTS* BASICS

2.1. Logging on to *eGrants*

To log on to* eGrants*, you must have a user account. If you have not created your account, see section 1.3 of this manual for instructions.

To log on, go to the Corporation's web site at www.nationalservice.org and click on the *eGrants* button. Click the "**Log In**" button and sign in as a current user. A popup box will appear (see below) and you will be prompted for your username and password (***leave the database category blank***). After this information is entered, click the "**Connect"** button.



The first time that you log on to *eGrants*, enter your username and the password that was provided in the email notification. ***A popup box will appear informing you that your password has expired***. Click "**OK**." You will then be prompted to change your password. When doing so, you must follow these rules:

The password cannot start with a common word from the dictionary
The password must contain at least one number
The password cannot start with a number
The password must be at least 6 characters

In the future whenever you log on to *eGrants*, you will use your username and the new password that you create.

For security purposes, you will be required to change your eGrants password once every twelve months. In one year from the date on which you create your password, eGrants will inform you that your password has expired and will prompt you to change it. Follow the same rules as above for creating your new password.

Do not close the browser window with the blank, gray background. This must always remain open. Closing it will interrupt your *eGrants* session and you will lose any unsaved work!

2.2. Forgotten Password

If you already have an *eGrants* account and have forgotten your password, follow the instructions below to reset your password.

(If you do not currently have an eGrants account, you can create one by following the steps in section 1.3, **Creating Your Account**.)

1. Go to the Corporation's website at www.nationalservice.org and click on the *eGrants* button.

2. Click on "**Forgot Password.**"

3. This will take you to the **Reset Password** screen. Enter your first name, last name and e-mail address in the space provided on the form. Click "**Continue**."

4. On the next screen, you will be asked to answer the question you supplied when you created your account. You will have three chances to get the answer correct. If you enter an incorrect answer, you will receive a warning message indicating that the answer is incorrect. After the third unsuccessful try, you will be logged out of the system and will have to try again.

5. Once you have entered the correct answer, click "**Reset Password.**"

6. A confirmation screen will be displayed, and your new password will be sent to you by e-mail.

7. Once you have received your new password, you will be able to log on following the instructions in **Section 2.1**.

2.3 User Access and Roles

2.3.1 Roles in *eGrants*

The *eGrants* system has three possible roles for users who are applying for grants: **Grantee, Grantee (no budget privileges)** and **Grantee Administrator**.

Grantee Role: The Grantee Role allows an individual to view his/her organization's information, including past and current grants. He/she can also enter and submit a grant to the Corporation or a state commission.

Grantee (no budget privileges): The Grantee (no budget privileges) Role allows an individual the same privileges as the Grantee Role, but **does not allow access to the budget.** An individual with this role can make programmatic edits and can view a budget report with major categories, but cannot enter/edit the budget page or see detailed line items.

Grantee Administrator Role: The Grantee Administrator role is for the person(s) in an organization who will be responsible for maintaining the organization's *eGrants* account. He/she is responsible for account security, updating the organization's information and assigning roles to staff. The Grantee Administrator role is usually assigned to the first user to create an account for an organization. More than one person may have the Grantee Administrator role in an organization.

Account Security: The Grantee Administrator is responsible for monitoring user accounts, and ensuring that no unauthorized users have access to their organization's information.

If an individual leaves an organization and should no longer have access to eGrants, the Grantee Administrator must deactivate their account.

When a new user creates an account within an organization, the Grantee Administrator will be notified by e-mail. For the account to become active, the Grantee Administrator must assign either the "Grantee" or "Grantee (no budget privileges)" role to the user. **The user will not be able to access eGrants until one of these roles has been assigned.**

To ease the process for staff, the Grantee Administrator does have the ability to associate a user to an organization and assign a role before the user account has been created. In this case, the user will have access to *eGrants* immediately.

(For detailed instructions on each of these actions, go to section 2.6.)

Updating Your Organization's Information: The Grantee Administrator is responsible for updating your agency's contact information when needed. At

State Commissions, Grantee Administrators will also be responsible for entering commissioner's contact information as well. (For instructions on how to do this go to section 2.6.)

Assigning Grantee Administrator Role to Other Staff: The Grantee Administrator can assign this role to other staff within the organization. This is a good idea if you are with a large organization, or if the Grantee Administrator will be out of the office for any period of time. (For instructions on how to do this go to section 2.6.)

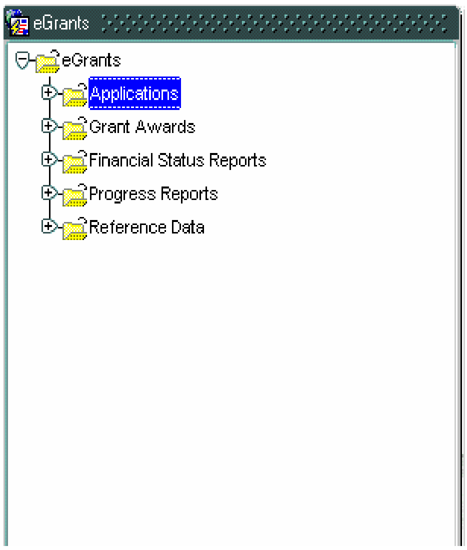
2.3.2 Authorized Representative

The Authorized Representative is the person from your organization who will electronically sign the assurances for your grant application. This person, as well as any others completing the grant application in *eGrants*, will be required to obtain an account and access *eGrants*. (The Authorized Representative may have either "Grantee" or "Grantee Administrator" access – this is up to the organization.)

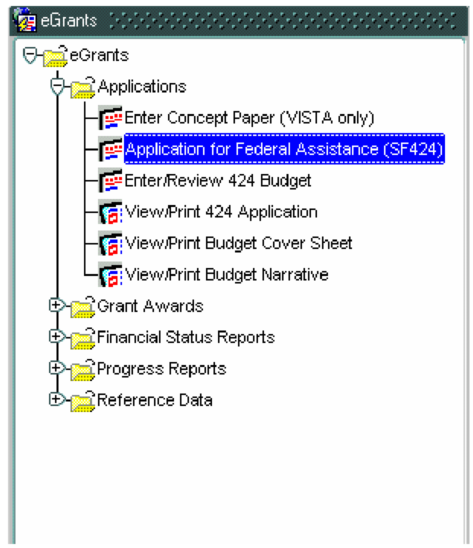
2.4 NAVIGATING *EGRANTS*

2.4.1 *eGrants* Main Menu

After you log in to the system, you will be brought to the *eGrants* main menu, which is a "tree" of selections that appears on the left hand side of your screen (see Screen 1 below). Each selection expands to subsections when you click on the + to the left of the selection (see Screen 2 below).



Screen 1: Main Menu



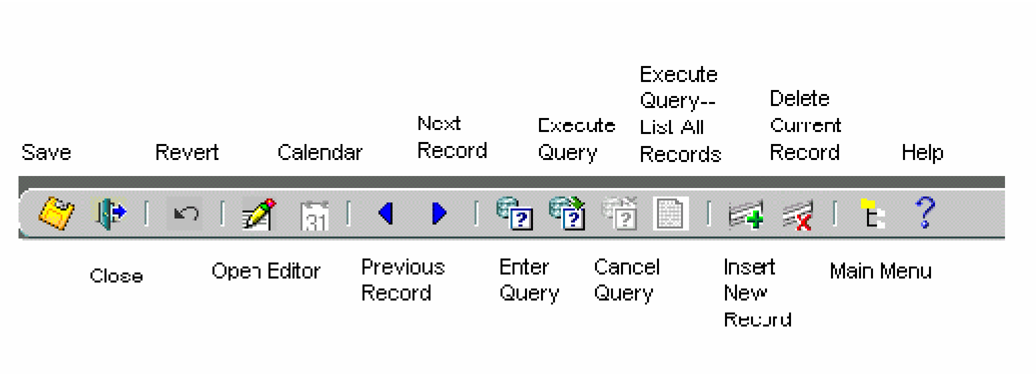
Screen 2: Expanded Main Menu

Clicking <u>once</u> on the + sign will expand the menu, and clicking on the – sign will condense it to the original selection.

Once you find the selection you want, double click on it, and you will go to that screen.

2.4.2 Toolbar

A series of 15 icons appear at the top of your *eGrants* screen. This "Toolbar" provides you with easy ways to navigate around the *eGrants* system with one click on an icon. Each icon performs a function, such as save, delete, advance to the next record, etc.



Most of the time when you are using *eGrants*, you will be in "**Data Entry**" mode. Data entry mode means the system allows you to input or delete information.   All the icons are available for your use when you are in data entry mode.

To search for an application you have already started, or a grant already in the system, you must enter "**Query**" mode. By clicking on the query icon, you ready the system to search for the record you want. You can tell when the system is in query mode, because the fields on which you can search become yellow. To learn more about **Query, see 2.5.7, "Retrieving Your Application."**

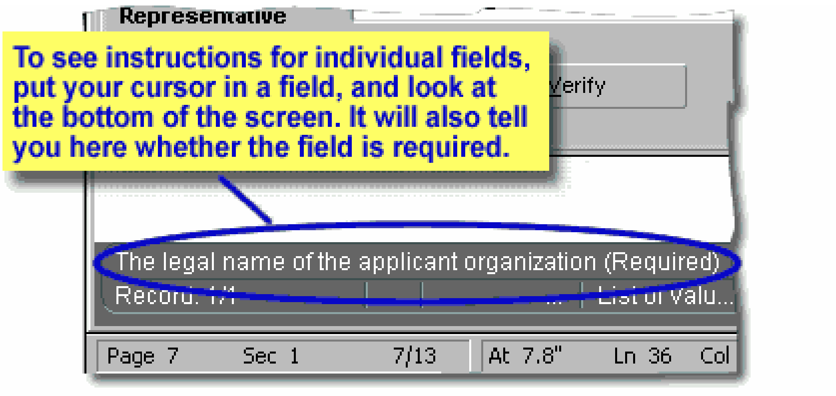
Most of the icons in the toolbar will be grayed out when the system is in query mode. A grayed out icon means you can't use it in this mode.

2.4.3 Status Bar

The status bar in the lower left corner of the screen can be a valuable source of information. It will:

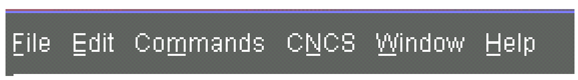
- Give you hints on what to enter in a particular field
- Provide important messages on what you need to do in order to continue completing your application
- Tell you whether you are in query mode or not. To learn more about Query, see **2.5.7, "Retrieving Your Application**."

It is good to get in the habit of checking the status bar frequently; it will provide useful information in completing your application.



2.4.4 Pull Down Menus

There are six pull down menus across the top of the screen above the toolbar. Pull down menus are another way to access the functions of the system.



The pull down menus work the same in *eGrants* as they do in any other software application. Click on the menu you want, and scroll down to the selection under that menu you wish to execute.

2.4.5 Function Keys

Function keys are a quick way to execute many of the functions on the toolbar or pulldown menu. In the list below, the top row lists the functions you can perform just by hitting the function keys; the bottom row are functions you can perform by hitting SHIFT + the function key.

	F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
eGrants	*	List tab pages	Duplicate Item	Duplicate Record	Block Menu	Insert Record	Enter Query	Execute Query	List of Values-LOV	Save
SHIFT	Display Record	Count Query	*	Clear Record	Clear Block	Delete Record	Clear Form	Print	*	*

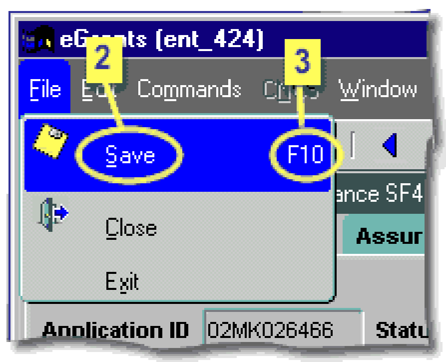
2.5 Common Functions

We will walk through the first few functions with pictures. After those, you can refer to the toolbar, function keys list, and pull down menus.

2.5.1 Save

It is important to get in the habit of saving the information you have entered regularly. The system will not always save automatically (like AutoSave in Microsoft Word), and if you close out of the *eGrants* system before saving, you will lose all of the information you have entered since the last time you saved!

Three ways to save:



1) Toolbar – Save icon

2) Pull Down Menu – File/Save
3) Keyboard Function – F10

2.5.2 Revert

The Revert button is a useful one, but must be used with care!!! If you hit the Revert button, you will lose ANY information you entered after the last time you saved. It will not simply "Undo" the very last thing you did or typed. Revert can be useful, though, when you are stuck in a field you can't get out of.

There are two ways to REVERT back to your last save:

1. Click on the revert button on the toolbar

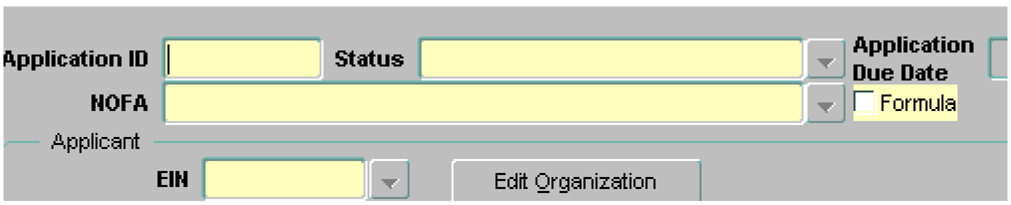
2. Pull down the Edit menu and select Revert

2.5.3 Delete an Application

You may find that you need to delete an application you have started but not submitted yet to the Corporation. (Note: Once an application has been submitted to the Corporation, you cannot change or delete it.) To delete an unsent application:

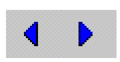
1. Click the Enter Query icon on the toolbar or Press F7 on your keyboard.

2. Type in your organization's EIN number, or if you know it, the Application ID number:



3. Click the Execute Query icon on the toolbar or Press F8 on your keyboard.

4. Browse the records (applications) by using the Next Record or Previous Record icons on the toolbar.



5. Click the delete button on the toolbar.

6. You will receive a message that says, "Are you sure you want to delete this record?" Click YES.

Your application is now deleted.

2.5.4 Close

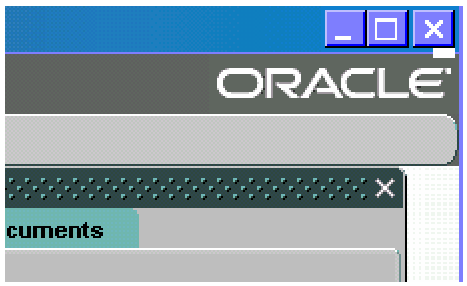
If you want to close the window you are working in and return to the main menu, click on the Close icon. You will get a message "Close this form?" Click OK.

If you want to return to the main menu but leave the window open, click on the Main Menu icon. This will return you to the Menu tree while leaving the window open. Be careful; leaving too many windows open at once can slow the system down or cause it to freeze up.

2.5.5 Exiting the System

There are two ways to exit *eGrants*.

1. You can click on the X in the top right hand corner of the screen.



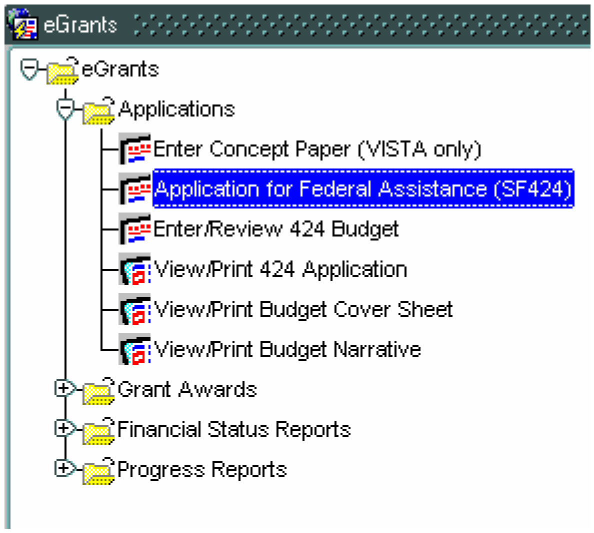
2. Pull down the FILE menu and scroll to Exit.

You will get a message: "This will close the entire *eGrants* application. Do you want to exit?" Click Yes. Once the *eGrants* screen is closed, you must also close the Internet window to log off the Internet.

Do not close the browser window with the blank, gray background. This must always remain open. Closing it will interrupt your *eGrants* session and you will lose any unsaved work!

2.5.6 Retrieving Your Application

Once you begin an application, you can save it and return to it at any time. To retrieve your application, go to the **Application for Federal Assistance (SF424)** from the *eGrants* main menu.



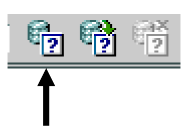
The application last worked on will be displayed automatically.

If the application you are looking for is not displayed, you can search for it using one of two methods.

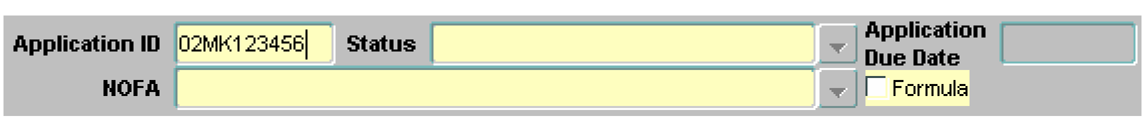
Query on the specific application ID number.

If you know your application ID number, you can do a search (query) on the specific application. To do that:

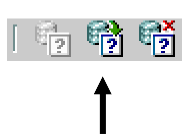
1. Enter "query mode" by clicking the "Enter Query" button on the toolbar or pressing **F7** on your keyboard. You will know that you are in query mode because all the fields in the screen will be yellow.



2. Enter your application ID number in the "Application ID" field.



3. Click on the "Execute Query" button on the toolbar or press **F8** on your keyboard.



4. This will bring up your application.

Scrolling through all applications for your organization.

If your organization has more than one application started or submitted to the Corporation, you can manually scroll through all the applications for your organization to find the one you are looking for.

You will know that your organization has more than one application by looking at the **Status Bar** at the bottom of the screen. When you first enter the **Application for Federal Assistance (SF424)**, the status bar will look like the following, if you have more than one application.

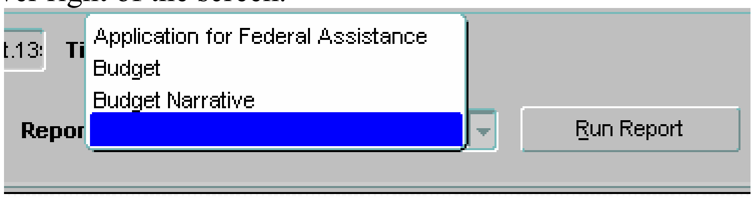
To find your application, use the blue arrows on the tool bar to scroll through the applications.

You may also retrieve an application that has already been submitted to the Corporation or awarded using the same procedures.

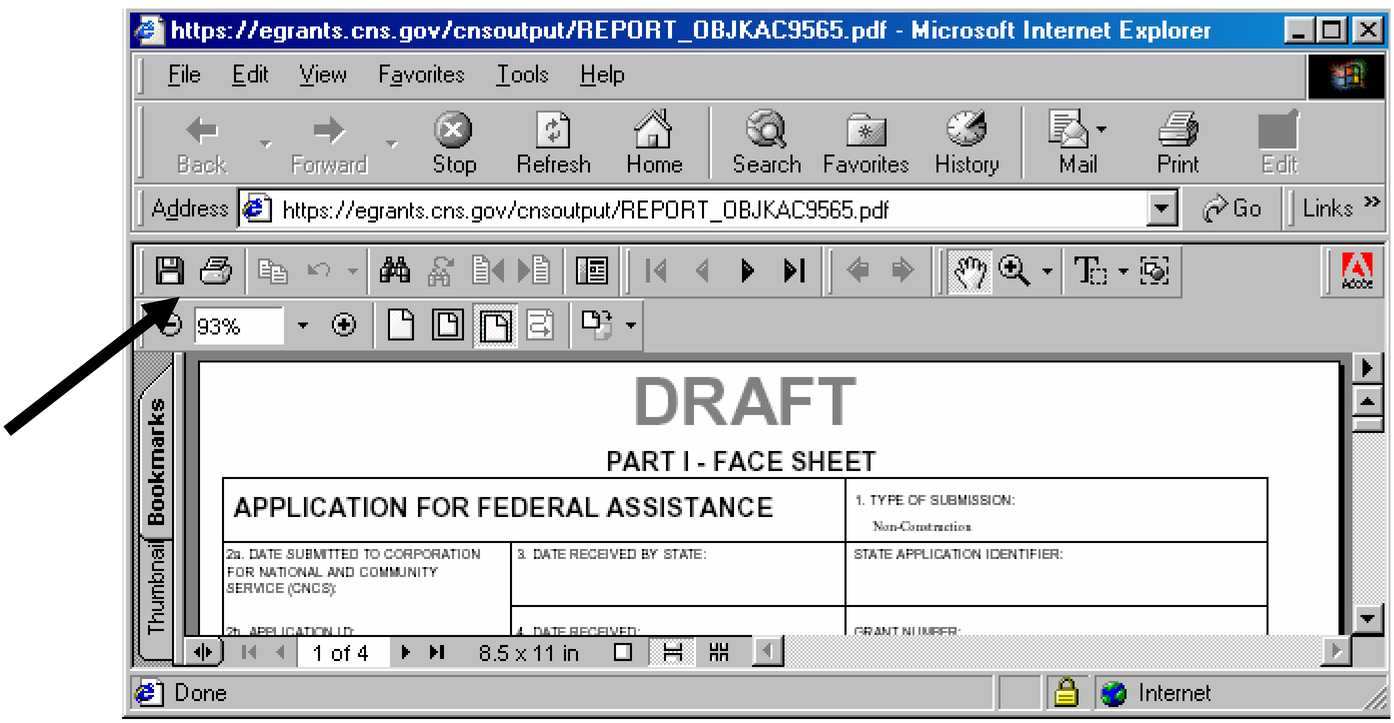
2.5.7 Printing Your Application

If you would like a hard copy of your application, you need to run a report in *eGrants*. To do that:

1. Go to the **Application for Federal Assistance (SF424)** screen.
2. Select one of the reports you would like to run (Application for Federal Assistance, Budget, Budget Narrative) from the drop down list located on the lower right of the screen.



3. Click the "**Run Report**" button.
4. This will open Adobe Acrobat Reader and a new window.

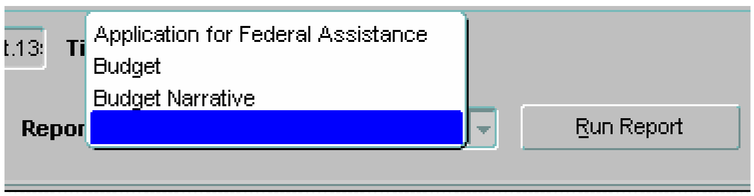


5. You may print your report/application from here.

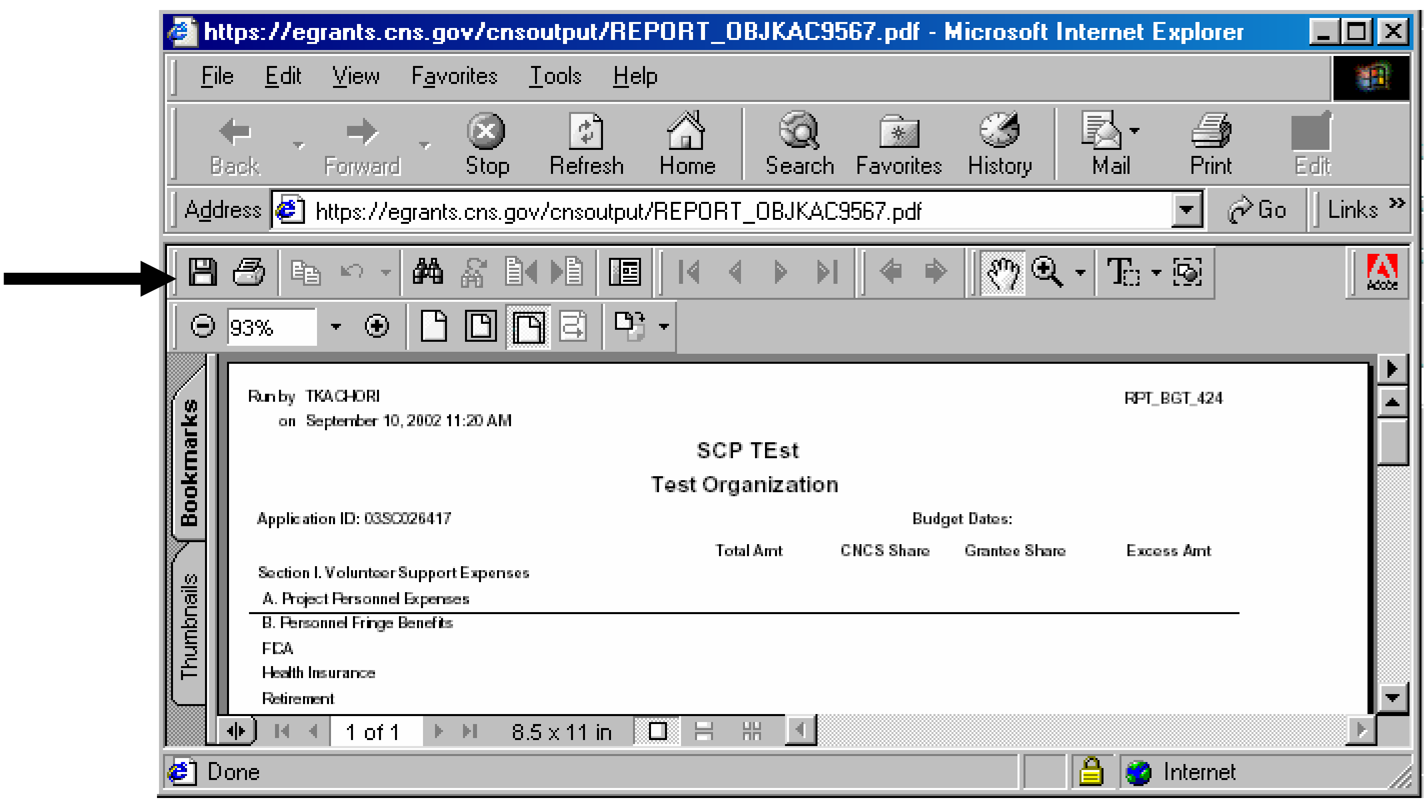
2.5.8 Saving Your Application

Your application is automatically saved to a central database, so you are not required to save your application to your hard drive or a diskette. However, if you would like to save a copy, you need to run a report in *eGrants*. To do that:

1. Go to the **Application for Federal Assistance (SF424)** screen.
2. Select one of the reports you would like to run (Application for Federal Assistance, Budget, Budget Narrative) from the drop down list located on the lower right of the screen.



3. Click the "**Run Report**" button.
4. This will open Adobe Acrobat Reader and a new window.



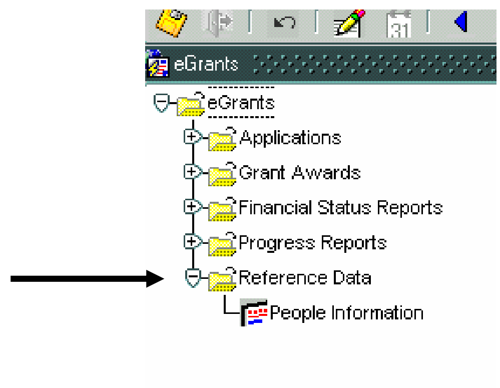
5. You may save your report/application from here. To do this, ***you must have Adobe Acrobat Reader 5.0 or higher***.

Maintaining Organization and People Information

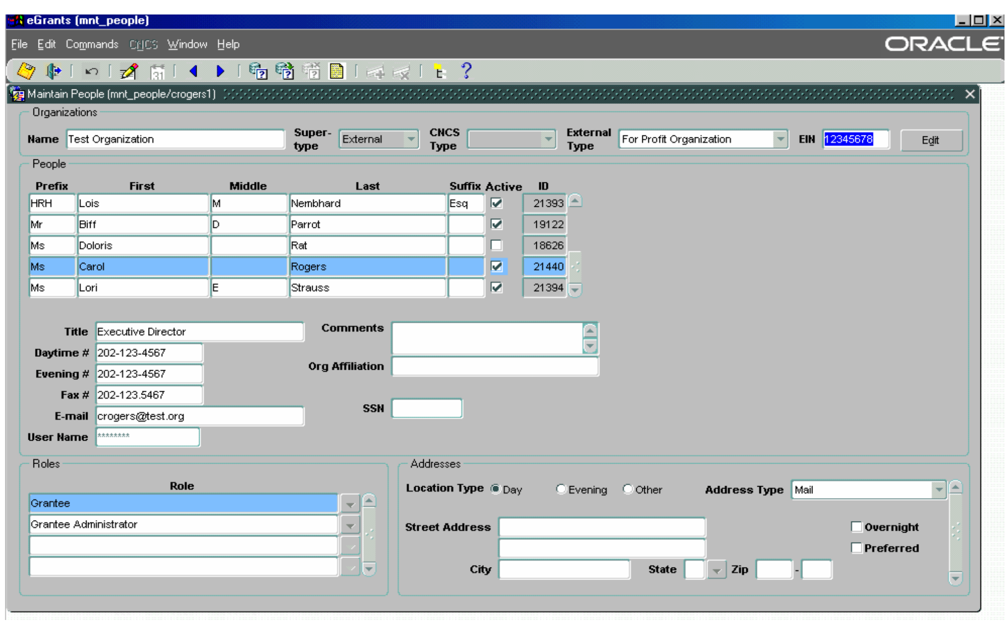
The following are the instructions the Grantee Administrator will follow if ***corrections need to be made to the organization's basic information or to update a user account***. The Grantee Administrator can make changes only ***after*** he or she has created an *eGrants* account and logged on (see Sections 1.3 and 2.1).

1. Log onto *eGrants*

2. Expand the "**Reference Data**" folder in the *eGrants* main menu tree by clicking once on the + sign. (If you do not have a Reference Data folder in your menu tree, you do not have the Grantee Administrator role in *eGrants*.)

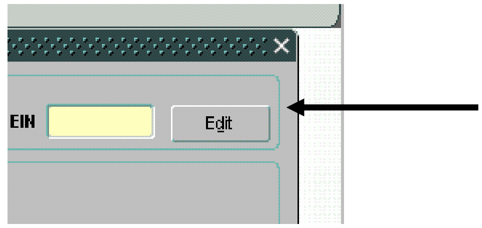


3. Double click on the "**People Information"** item to open the screen. The Maintain People screen will appear with your organization's information. (If more than one organization shares an EIN, you may have to scroll using the blue arrows on the toolbar to find the correct organization.)

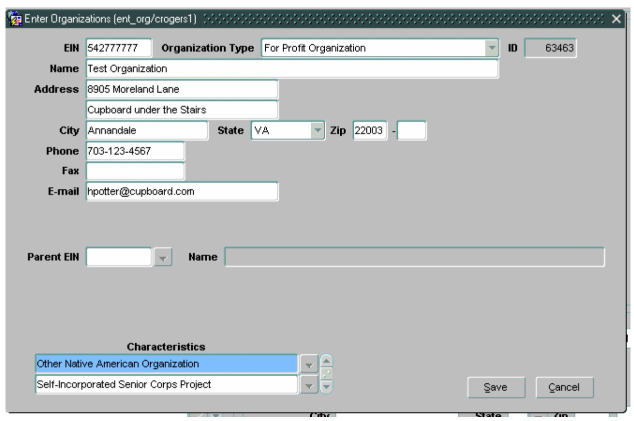


To update organization information:

4. To review and update your organization's contact information click on the ***Edit*** button on the far right side of the screen.



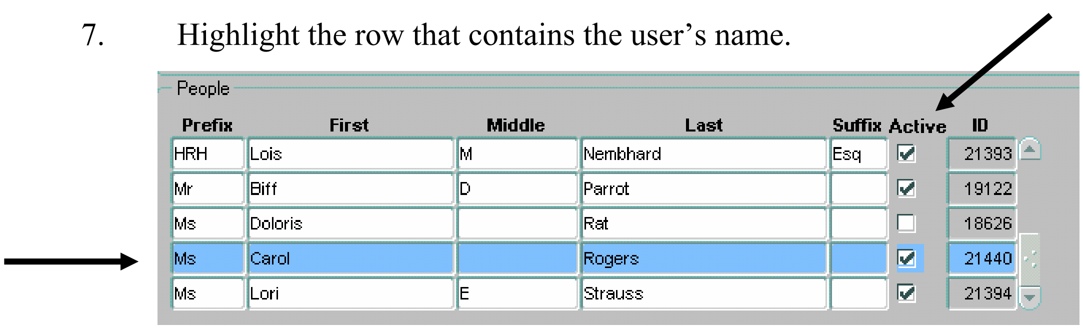
5. This will take you to your organization's profile. Review the information and make any necessary changes.



6. Click on the ***Save*** button to save your updated organization information.

To update user accounts:

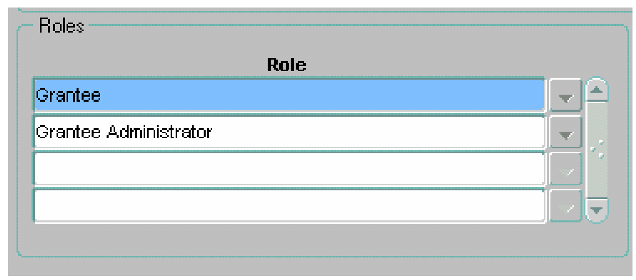
7. Highlight the row that contains the user's name.



8. If needed, **de-activate** an account, by un-checking the "**Active**" box to the right of the user's name.

9. Review the user’s **contact information** and make any necessary changes.

10. **Review the user’s current role** in eGrants at the bottom left hand of the screen. To **create an additional role** for that user, put your cursor in the next available space. Click on the inverted arrow button next to the field that is highlighted blue to select the appropriate role (**Grantee** or **Grantee Administrator**).



To **delete a role,** place your cursor in the field that contains the role and click on the red X on the tool bar to delete a record. (You cannot delete a role by simply deleting the text!)

11. **You may also** add a user **and assign their role before they actually create their account in *eGrants*. Doing this will allow that user to begin accessing *eGrants* as soon as their account is created. To do this, go to the next available field in the list of users, and click on the green plus sign to add a new record. Enter the user’s name and then update all of the appropriate information per the instructions above.**

12. ***Be sure to SAVE all of your changes before exiting the screen!***